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**Section A. To be completed by Taxpayer (continued)**

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**Part III. Life Events (Check Yes or No to all questions below)**

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- ☐ Yes ☐ No 1. If you are due a refund, would you like a direct deposit?  
☐ Yes ☐ No 2. If you have a balance due, would you like a direct debit?

**During 2009 did you (or your spouse if filing a joint return):**

- ☐ Yes ☐ No 3. Buy a brand new vehicle? If yes, date of purchase: \_\_\_\_\_  
☐ Yes ☐ No 4. Buy a home? If yes, closing date: \_\_\_\_\_  
☐ Yes ☐ No 5. Have a foreclosure or did the bank cancel any part of your mortgage loan?  
☐ Yes ☐ No 6. Receive an Economic Recovery Payment from Social Security Administration, Railroad Retirement Board, or Veterans Administration? If yes, how much? ☐ \$250 ☐ \$500  
☐ Yes ☐ No 7. Are you or your spouse a government retiree?  
☐ Yes ☐ No 8. Purchase and install energy efficient home items? (such as windows, furnace, insulation, etc.)  
☐ Yes ☐ No 9. Live in an area that was affected by a natural disaster? If yes, where? \_\_\_\_\_  
☐ Yes ☐ No 10. Pay college tuition for yourself, your spouse, or your dependents?  
☐ Yes ☐ No 11. Have any student loans?  
☐ Yes ☐ No 12. Make estimated tax payments or apply last year's refund to your 2009 tax?  
If yes, amount \_\_\_\_\_
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**Part IV. Income – In 2009, did you (or your spouse) receive: (Check Yes or No to all questions below)**

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- ☐ Yes ☐ No 1. Wages or Salary  
☐ Yes ☐ No 2. Tip Income  
☐ Yes ☐ No 3. Scholarships  
☐ Yes ☐ No 4. Interest/Dividends from: checking or savings accounts, bonds, CDs, brokerage, etc.  
☐ Yes ☐ No 5. State Tax Refund: If yes, did you itemize your deductions last year? ☐ Yes ☐ No  
☐ Yes ☐ No 6. Self-Employment Income (such as earnings from contract labor, small business, hobby, etc.)  
☐ Yes ☐ No 7. Alimony Income  
☐ Yes ☐ No 8. Proceeds (or loss) from the sale of Stocks, Bonds or Real Estate (including your home)  
☐ Yes ☐ No 9. Disability Income  
☐ Yes ☐ No 10. Pensions, Annuities, and/or IRA Distributions  
☐ Yes ☐ No 11. Unemployment Compensation  
☐ Yes ☐ No 12. Social Security or Railroad Retirement Benefits  
☐ Yes ☐ No 13. Income from Rental Property  
☐ Yes ☐ No 14. Other Income: (gambling, lottery, prizes, awards, jury duty, etc.) Identify: \_\_\_\_\_
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**Part V. Expenses – In 2009 Did you (or your spouse) pay: (Check Yes or No to all questions below)**

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- ☐ Yes ☐ No 1. Alimony: If yes, do you have the recipient's SSN? ☐ Yes ☐ No  
☐ Yes ☐ No 2. Contributions to IRA, 401 k, or other retirement account, including employer retirement account  
☐ Yes ☐ No 3. Educational expenses (such as a computer, books, etc.)  
☐ Yes ☐ No 4. Classroom supplies if you are a teacher  
☐ Yes ☐ No 5. Medical expenses  
☐ Yes ☐ No 6. Home mortgage interest  
☐ Yes ☐ No 7. Real estate taxes for your home  
☐ Yes ☐ No 8. Charitable contributions  
☐ Yes ☐ No 9. Child/dependent care expenses that allowed you and your spouse, to work or to look for work
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**STOP HERE!**

Thank you for completing this form.

Please give this form to the certified volunteer preparer for use in preparing your return.